

MCLANE SUMMARY THROUGH FEBRUARY 25

Total McLane

- Industry volume increased due to Premium and Discount brand promotional activity in C-Stores.
- PM's downward share trend was positively offset by a gain in C-Stores this week.
 - Marlboro's share has increased for the second consecutive week due to gains in C-Stores (Incentives at Circle-K, Region 5, and a Flex Fund at Sunshine Jr, Region 2).
 - PM Discount increased this week with Basic volume gains at Sam's, 2-pack w/cassette incentives at Circle-K in Region 2, and PM's Private Label Generals gains at Dairy Mart with a four-week average share of 25.2.
- RJR's share remained flat as Premium gains (including increased Winston and Camel promotions) have been offset by discount losses (particularly Monarch and Best Value).
 - RJR's promotions have increased recently in C-Stores:
 - Winston Select B1G1F (Regions 1-5)
 - Winston 2 pack w/mug (Circle-K, Region 5)
 - Camel Collector packs (Regions 3-5)
 - Doral B1G1F (Region 3).

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**MCLANE SHIPMENT DATA
(C-Stores & Mass Merch)**

<u>COMPANY</u>	<u>PM</u>	<u>RJR</u>	<u>B&W</u>	<u>American</u>	<u>Lorillard</u>	<u>Liggett</u>							
4 wk Base April 2,1993	39.66	37.42	13.76	3.76	4.30	1.07							
February 25, 1993 (4wm)	<u>45.24</u>	<u>30.64</u>	<u>12.35</u>	<u>4.94</u>	<u>5.26</u>	<u>1.53</u>							
	5.58	(6.78)	(1.41)	1.18	0.96	0.46							
							Branded	Private					
<u>CATEGORY</u>	<u>Premium</u>	<u>Discount</u>	<u>Discount</u>	<u>Label</u>									
4 wk Base April 2,1993	54.90	45.10	32.71	12.39									
February 25, 1993 (4wm)	<u>65.39</u>	<u>34.61</u>	<u>26.98</u>	<u>7.63</u>									
	10.49	(10.49)	(5.73)	(4.76)									
							<u>Winston</u>	<u>Select</u>	<u>Camel</u>				
<u>MAJOR BRANDS</u>	<u>Marlboro</u>	<u>PM OPB</u>											
4 wk Base April 2,1993	21.44	7.33	5.12	0.18	3.88								
February 25, 1993 (4wm)	<u>27.78</u>	<u>8.78</u>	<u>5.83</u>	<u>0.77</u>	<u>4.17</u>								
	6.34	1.45	0.71	0.59	0.29								
							<u>Salem</u>	<u>Vantage</u>	<u>Now</u>				
<u>MAJOR BRANDS</u>	<u>Newport</u>	<u>Kool</u>											
4 wk Base April 2,1993	2.97	3.44	3.52	1.39	0.52								
February 25, 1993 (4wm)	<u>3.45</u>	<u>3.04</u>	<u>3.62</u>	<u>1.48</u>	<u>0.60</u>								
	0.48	(0.40)	0.10	0.09	0.08								
							<u>Alpine</u>	<u>Doral</u>	<u>Misty</u>	<u>Montclair</u>	<u>Monarch</u>	<u>Best Value</u>	<u>GPC</u>
<u>BRANDED DISCOUNTS</u>	<u>Basic</u>	<u>Cambridge</u>											
4 wk Base April 2,1993	5.85	1.83	0.35	4.38	0.46	0.67	3.54	4.30	7.97				
February 25, 1993 (4wm)	<u>4.25</u>	<u>1.96</u>	<u>0.40</u>	<u>5.06</u>	<u>0.85</u>	<u>1.06</u>	<u>1.68</u>	<u>1.87</u>	<u>6.75</u>				
	(1.60)	0.13	0.05	0.68	0.39	0.39	(1.86)	(2.43)	(1.22)				
							<u>Liggett</u>	<u>American</u>					
<u>PRIVATE LABEL</u>	<u>PM</u>	<u>RJR</u>											
4 wk Base April 2,1993	2.39	9.31	0.69	0.00									
February 25, 1993 (4wm)	<u>1.76</u>	<u>5.02</u>	<u>0.85</u>	<u>0.00</u>									
	(0.63)	(4.29)	0.16	0.00									

NOTE: THESE TOP 20 ACCOUNTS ARE PRIMARILY SUPPLIED WITH RJR PRIVATE LABEL PRODUCTS.

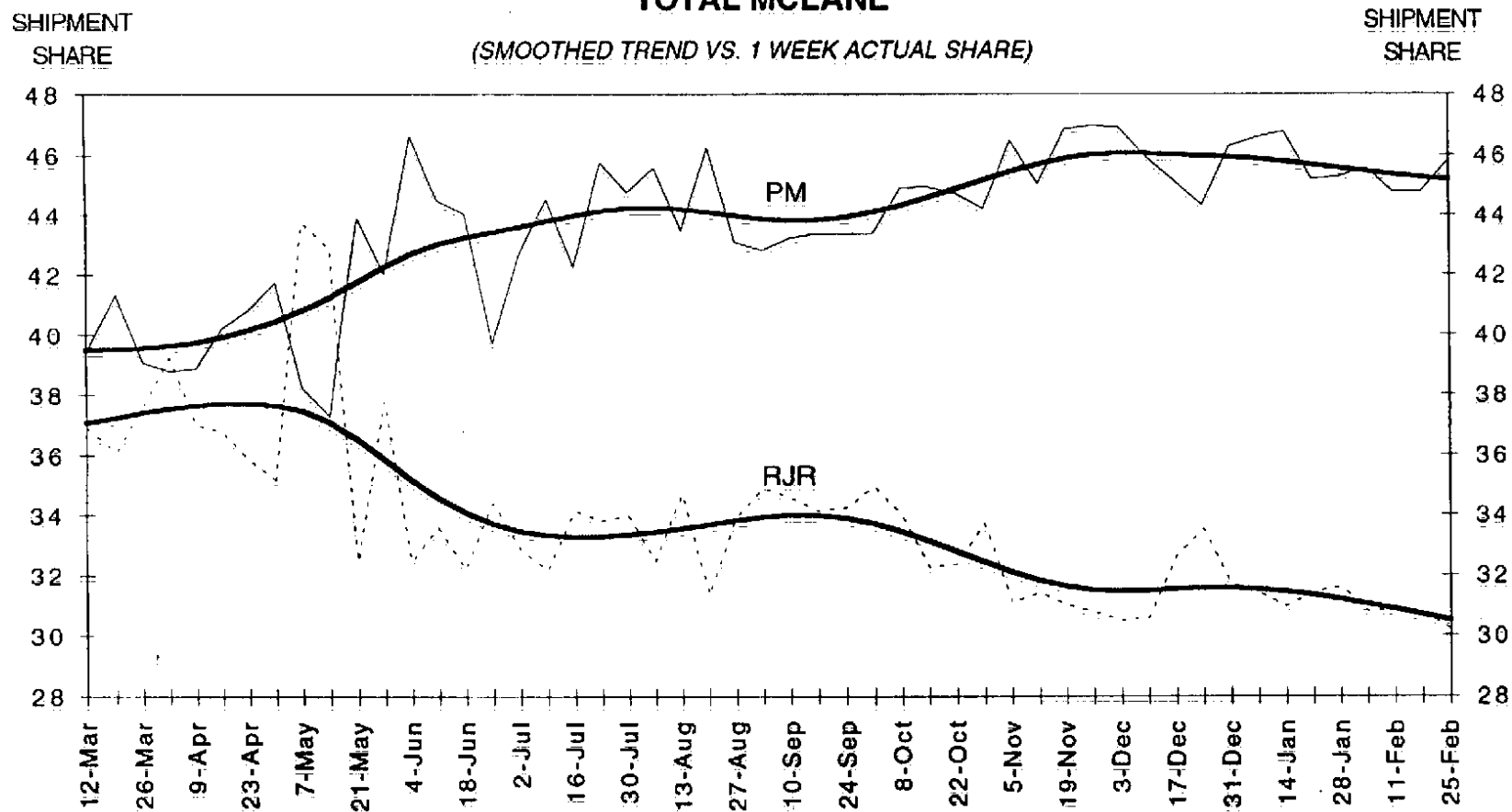
MCLANE SHIPMENT DATA
(C-Stores & Mass Merch)

<u>COMPANY</u>	<u>PM</u>	<u>RJR</u>	<u>B&W</u>	<u>American</u>	<u>Lorillard</u>	<u>Liggett</u>				
4 wk Base August 6,1993	44.57	33.64	12.29	3.76	4.25	1.49				
February 25, 1993 (4wm)	45.24	30.64	12.35	4.94	5.26	1.53				
	0.67	(3.00)	0.06	1.18	1.01	0.04				
<u>CATEGORY</u>	<u>Premium</u>	<u>Discount</u>	<u>Branded Discount</u>	<u>Private Label</u>						
4 wk Base August 6,1993	57.86	42.14	33.62	8.52						
February 25, 1993 (4wm)	65.39	34.61	26.98	7.63						
	7.53	(7.53)	(6.64)	(0.89)						
<u>MAJOR BRANDS</u>	<u>Marlboro</u>	<u>PM OPB</u>	<u>Winston</u>	<u>Select</u>	<u>Camel</u>					
4 wk Base August 6,1993	24.85	7.14	6.32	0.78	3.06					
February 25, 1993 (4wm)	27.78	8.78	5.83	0.77	4.17					
	2.93	1.64	(0.49)	(0.01)	1.11					
<u>MAJOR BRANDS</u>	<u>Newport</u>	<u>Kool</u>	<u>Salem</u>	<u>Vantage</u>	<u>Now</u>					
4 wk Base August 6,1993	2.91	2.95	3.45	1.29	0.52					
February 25, 1993 (4wm)	3.45	3.04	3.62	1.48	0.60					
	0.54	0.09	0.17	0.19	0.08					
<u>BRANDED DISCOUNTS</u>	<u>Basic</u>	<u>Cambridge</u>	<u>Alpine</u>	<u>Doral</u>	<u>Misty</u>	<u>Montclair</u>	<u>Monarch</u>	<u>Best Value</u>	<u>GPC</u>	
4 wk Base August 6,1993	7.99	1.68	0.33	4.90	0.55	0.65	4.03	3.11	7.01	
February 25, 1993 (4wm)	4.25	1.96	0.40	5.06	0.85	1.06	1.68	1.87	6.75	
	(3.74)	0.28	0.07	0.16	0.30	0.41	(2.35)	(1.24)	(0.26)	
<u>PRIVATE LABEL</u>	<u>PM</u>	<u>RJR</u>	<u>Liggett</u>	<u>American</u>						
4 wk Base August 6,1993	2.26	5.52	0.74	0.00						
February 25, 1993 (4wm)	1.76	5.02	0.85	0.00						
	(0.50)	(0.50)	0.11	0.00						

NOTE: THESE ACCOUNTS ARE PRIMARILY SUPPLIED WITH RJR PRIVATE LABEL PRODUCTS.

PM'S DOWNWARD SHARE TREND WAS POSITIVELY OFFSET BY A GAIN IN C-STORES THIS WEEK. RJR'S SHARE TREND REFLECTED CONTINUED DISCOUNT LOSSES.

PM AND RJR WEEKLY SHARES TOTAL MCLANE

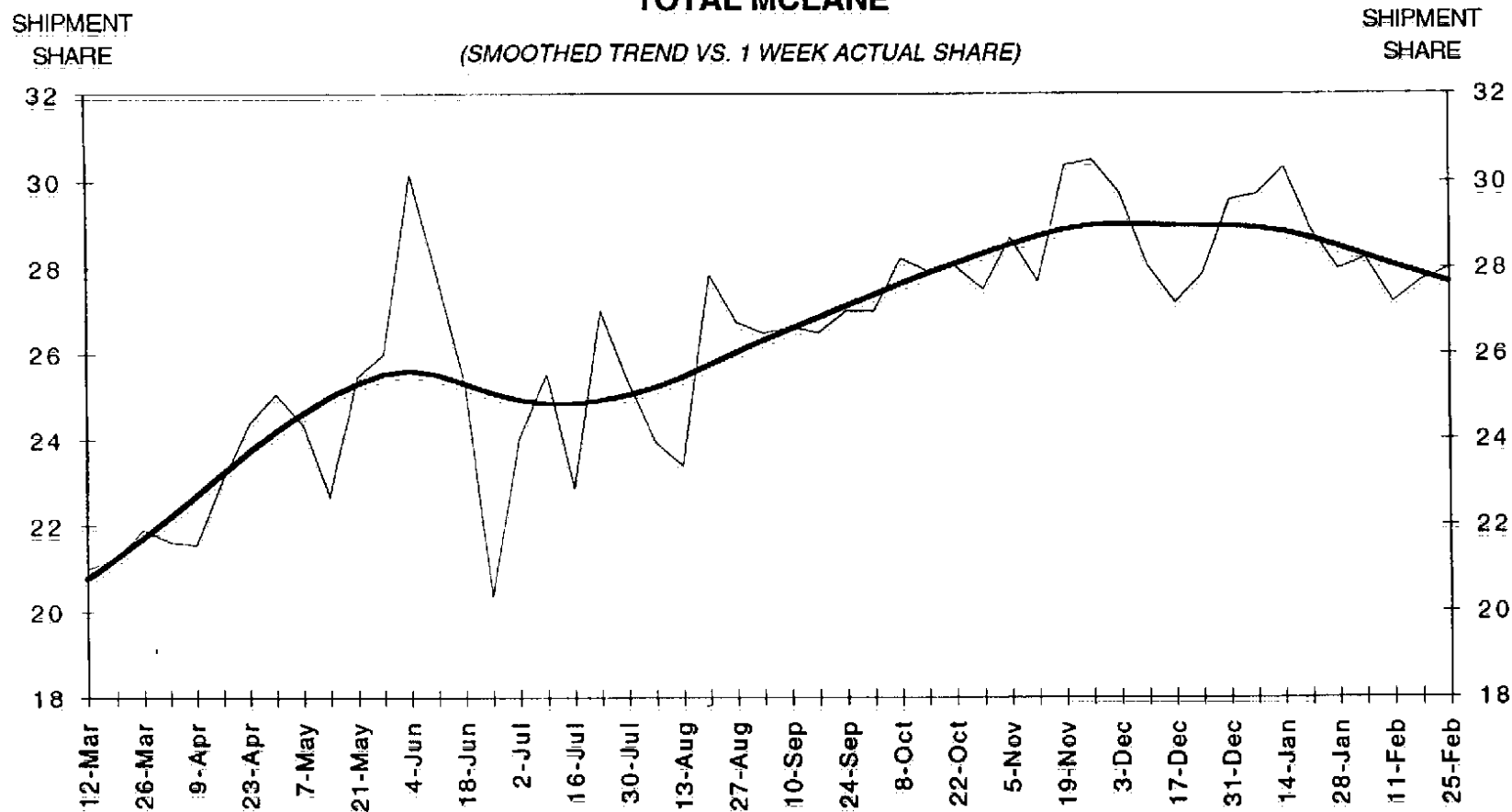


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JMP WEEKLY GRAPHS Chart 2

MARLBORO'S TREND REFLECTED PRIOR LOSSES AT SAM'S, BUT SHARE HAS INCREASED THE LAST TWO WEEKS DUE TO GAINS IN C-STORES WHERE INCENTIVES AND FLEX FUND PROMOTIONS WERE REPORTED.

MARLBORO WEEKLY SHARE TOTAL MCLANE

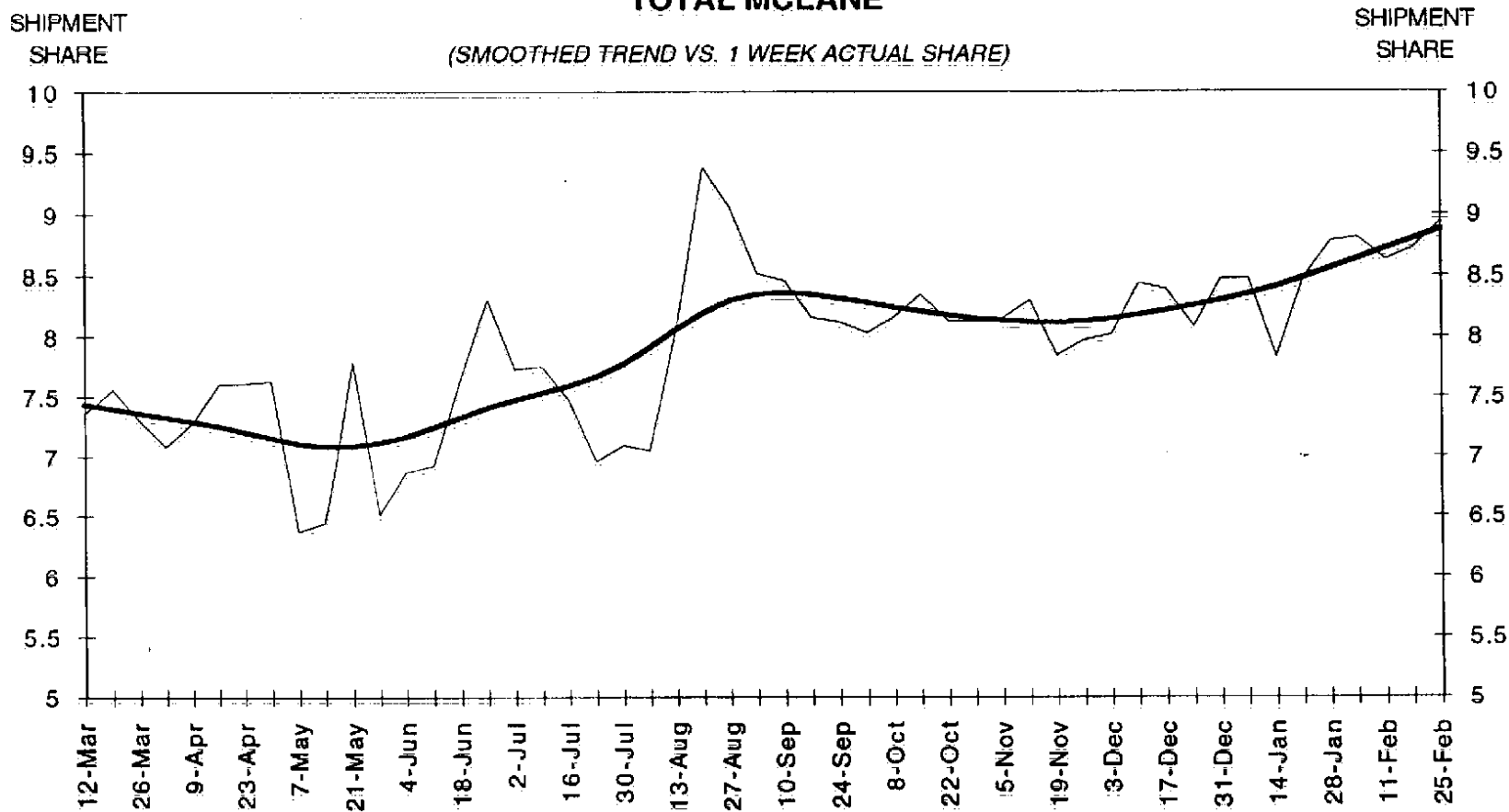


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JMP WEEKLY GRAPHS Chart 4

PM'S OTHER PREMIUM BRANDS HAVE REMAINED ON AN UPWARD TREND FOR THE LAST 13 WEEKS.

PREMIUM LESS MARLBORO WEEKLY SHARE TOTAL MCLANE

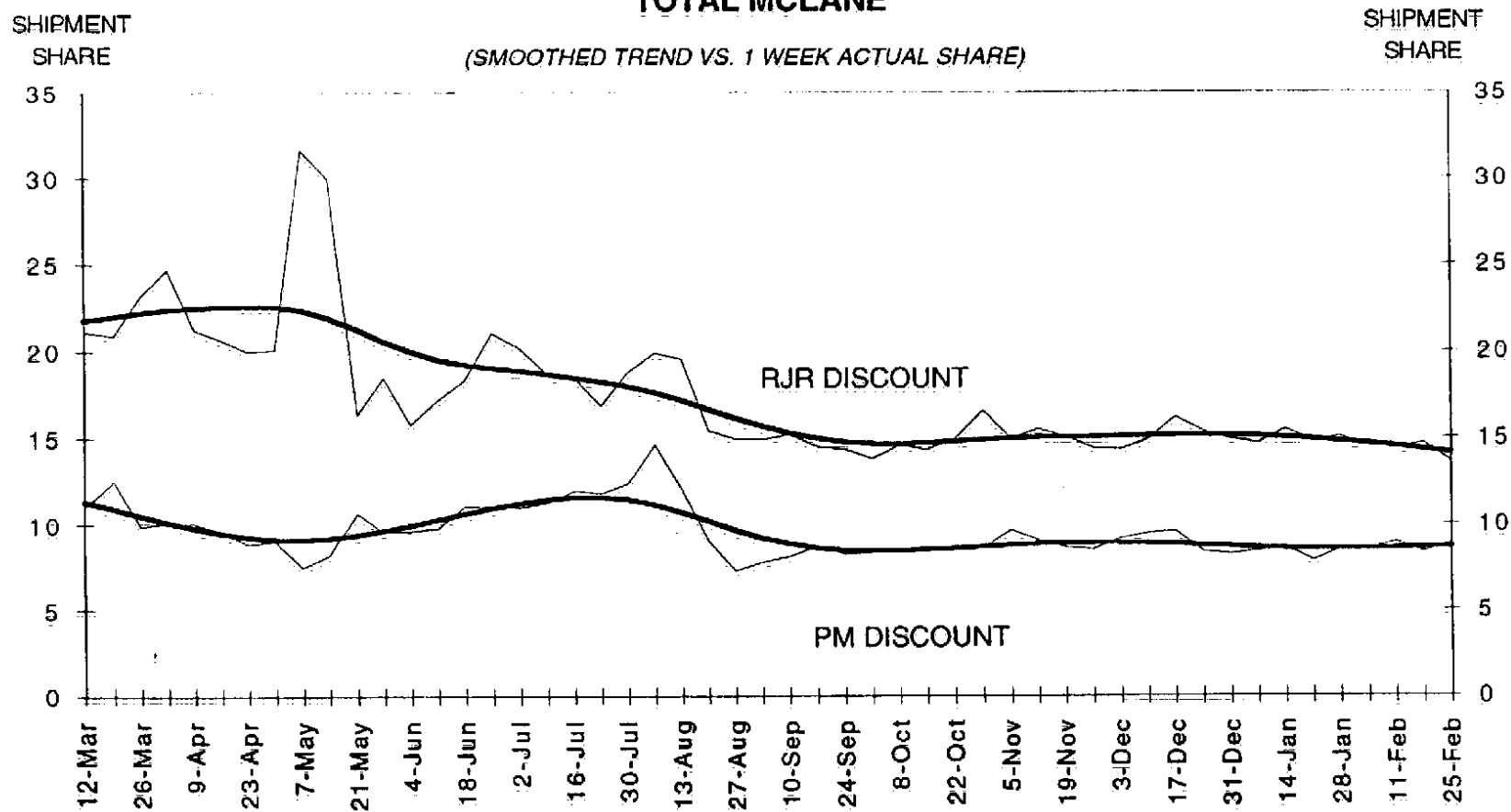


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JMP WEEKLY GRAPHS Chart 5

PM DISCOUNT WEEKLY SHARE INCREASED WITH RECENT GAINS FOR BOTH BASIC AND PM PRIVATE LABEL, WHILE RJR'S DISCOUNT SHARE DECREASED PRIMARILY DUE TO RECENT BRANDED DISCOUNT LOSSES.

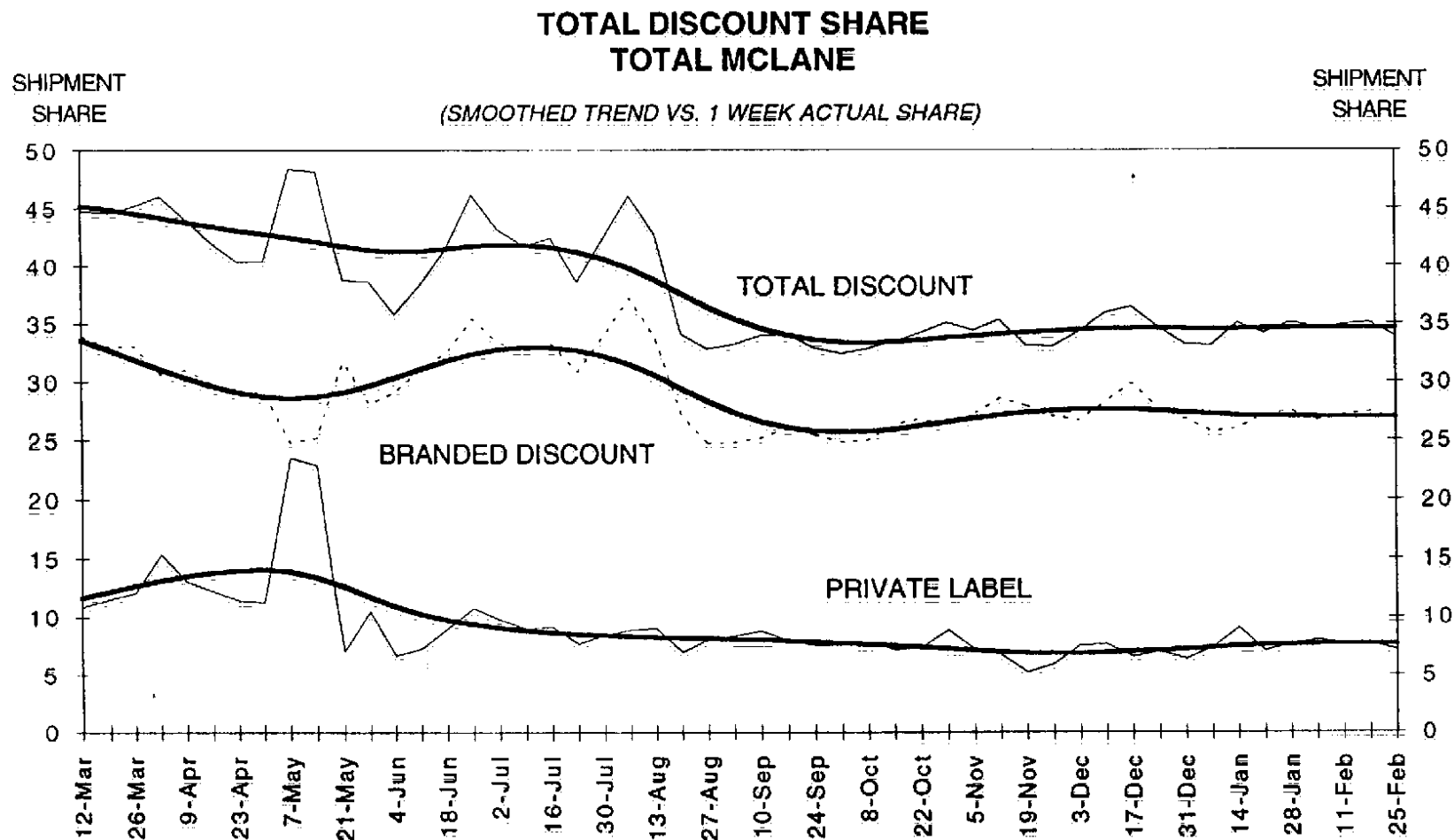
PM AND RJR DISCOUNT SHARE OF INDUSTRY TOTAL MCLANE



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JMP WEEKLY GRAPHS Chart 6

THE TOTAL DISCOUNT TREND REMAINED STEADY WITH SLIGHT WEEKLY COMPETITIVE DECREASES REPORTED FOR BOTH CATEGORIES, WHILE PM'S BASIC AND PRIVATE LABELS ROSE.

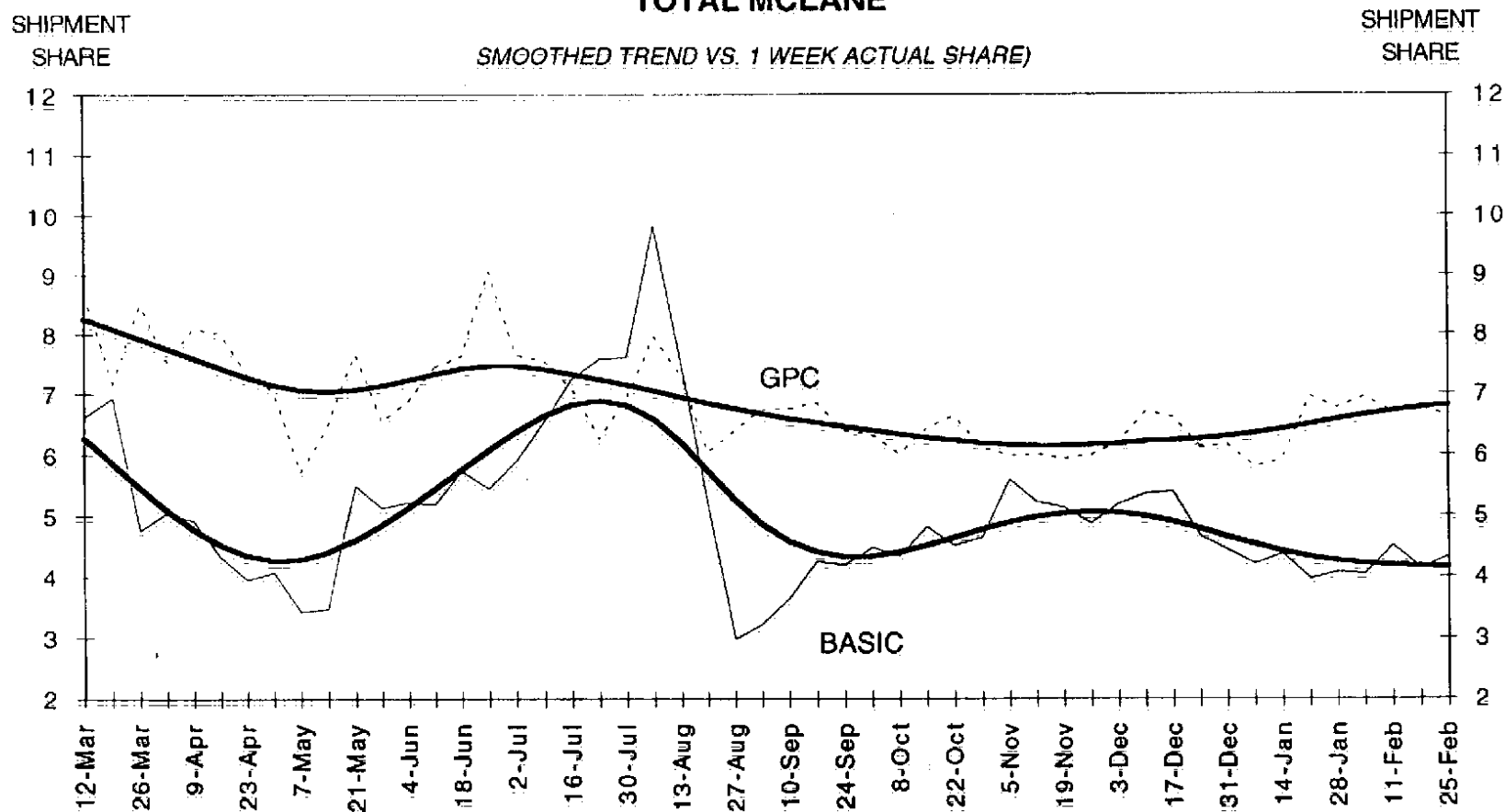


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JMP WEEKLY GRAPHS Chart 7

GPC CONTINUED ITS UPWARD TREND DESPITE LOWER LEVELS AT SAM'S THIS WEEK, WHILE BASIC REPORTED VOLUME GAINS AT SAM'S AND INCREASED INCENTIVE PROMOTIONS IN C-STORES.

BASIC AND GPC SHARE OF INDUSTRY TOTAL MCLANE

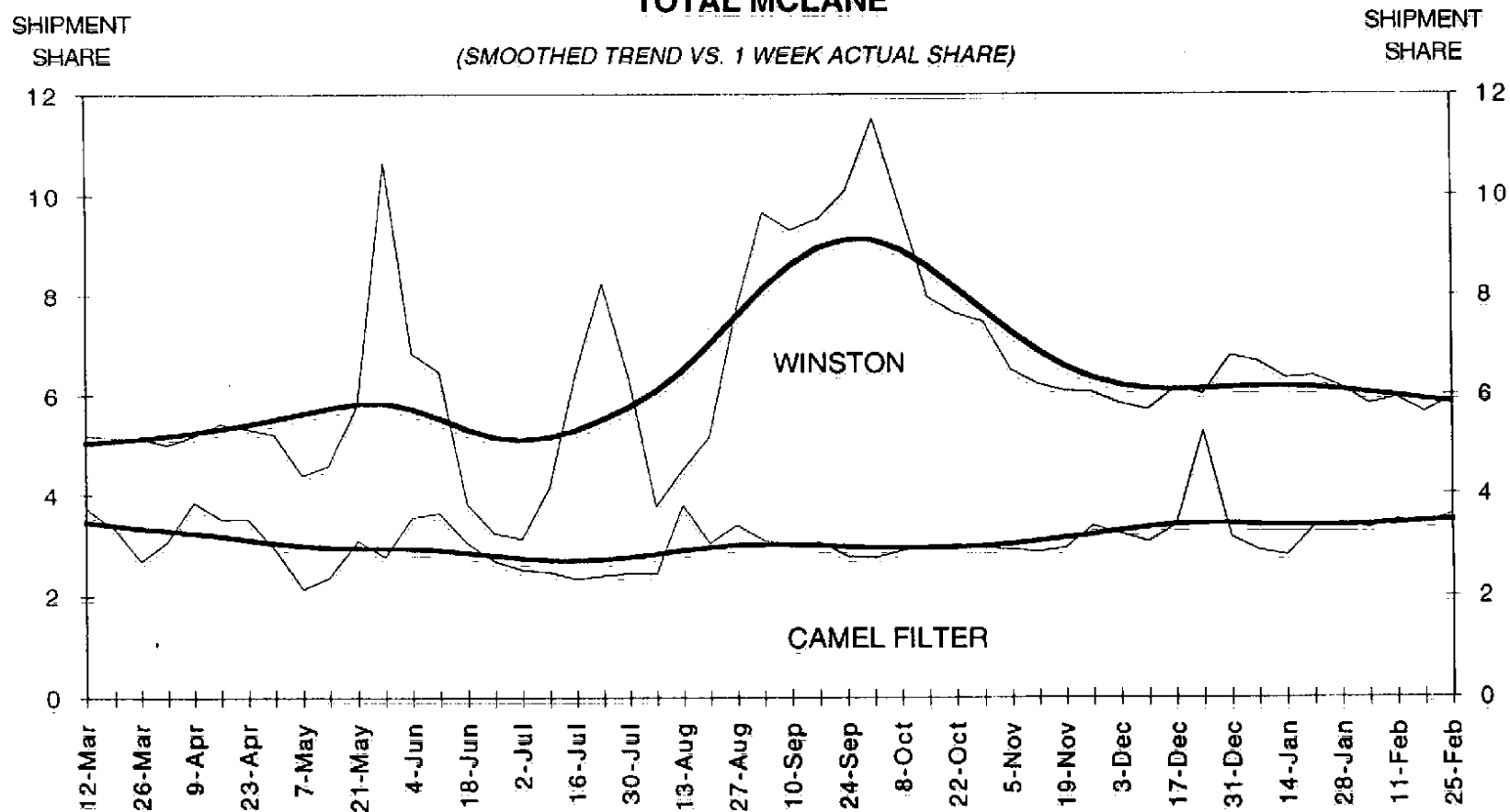


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JMP WEEKLY GRAPHS Chart 8

WINSTON AND CAMEL BOTH REPORTED WEEKLY GAINS (WINSTON FREE-PRODUCT IN WAL-MART AND C-STORES, AND CAMEL INCENTIVES IN C-STORES).

WINSTON AND CAMEL FILTER SHARE OF INDUSTRY TOTAL MCLANE



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JMP WEEKLY GRAPHS Chart 9